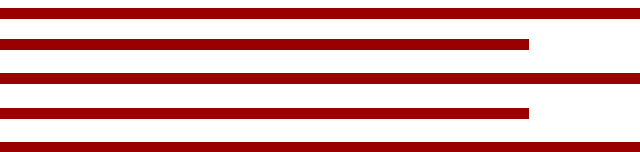


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

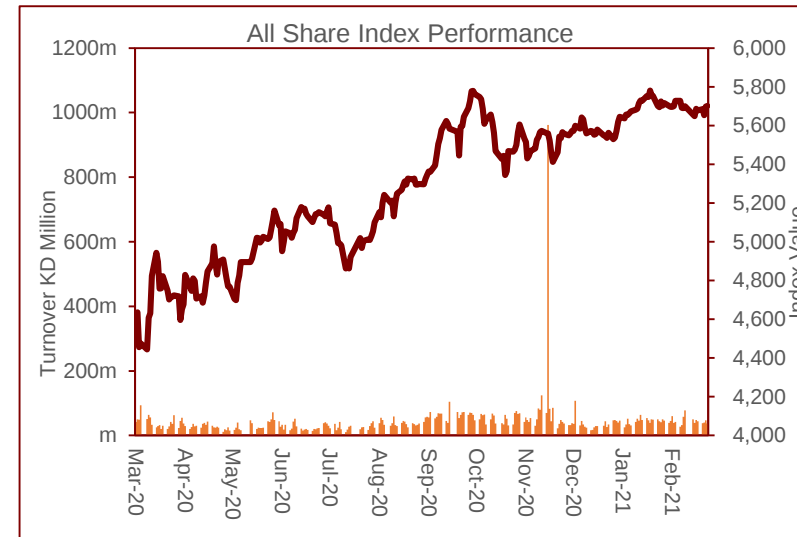
Wednesday, March 10, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 5,741.47 | 0.14  | 1.56  | 1.63  | 3.52  | 3.52  | 33.70 KWD     | 1.89 | 26.05 |
| Kuwait Premier Index   | 6,277.54 | 0.14  | 1.84  | 1.95  | 3.74  | 3.74  | 25.39 KWD     | 2.02 | 26.99 |
| Kuwait Main Index      | 4,680.79 | 0.12  | 0.68  | 0.65  | 2.82  | 2.82  | 8.30 KWD      | 1.46 | 23.43 |
| NIC 50                 | 6,885.35 | 0.10  | 1.79  | 1.87  | 3.67  | 3.74  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,305.14 | 0.30  | 1.96  | 2.42  | 3.38  | 3.38  | 19.19 KWD     | 1.37 | 27.99 |
| Telecom                | 1,132.87 | -0.01 | -0.03 | -1.24 | 2.77  | 2.77  | 3.47 KWD      | 0.60 | 14.19 |
| Industrials            | 893.06   | -0.09 | 1.23  | 0.54  | 0.22  | 0.22  | 3.19 KWD      | 0.69 | 11.13 |
| Financial services     | 987.24   | -0.14 | 1.15  | -0.26 | 6.19  | 6.19  | 2.55 KWD      | 0.64 | 5.83  |
| Real estate            | 1,015.51 | -0.32 | 1.87  | 1.91  | 6.60  | 6.60  | 2.19 KWD      | 0.49 | 33.03 |
| Basic materials        | 1,066.64 | -0.73 | 3.58  | 8.54  | 18.70 | 18.70 | 0.96 KWD      | 1.74 | 22.86 |
| Health care            | 810.92   | 0.00  | -0.28 | -0.28 | -1.90 | -1.90 | 0.40 KWD      | 5.29 | 40.51 |
| Consumer services      | 822.10   | 1.25  | 0.38  | 1.56  | 0.43  | 0.43  | 0.42 KWD      | 0.73 | 9.11  |
| Insurance              | 1,216.24 | -0.27 | 0.08  | 2.36  | 5.20  | 5.20  | 0.46 KWD      | 0.81 | 7.72  |
| Consumer goods         | 725.93   | -0.10 | -1.23 | -1.60 | -2.74 | -2.74 | 0.22 KWD      | 0.94 | 14.07 |
| Oil and Gas            | 1,211.96 | 2.07  | -0.88 | -2.44 | -5.12 | -5.12 | 0.25 KWD      | 0.68 | 5.35  |
| Technology             | 654.02   | 0.00  | -1.10 | 3.45  | 30.10 | 30.10 | 0.01 KWD      | 0.72 | 0.00  |
| Utilities              | 681.58   | 0.00  | 4.44  | 1.17  | -6.50 | -6.50 | 0.28 KWD      | 7.03 | 0.00  |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 9,595.45  | 1.29  | 3.82  | 4.93  | 10.43 | 10.43 | 9,454 SAR     | 2.33 | 19.41 |
| Qatar (QE Index)         | 10,272.11 | 1.52  | 2.68  | 1.24  | -1.57 | -1.57 | 520 QAR       | 1.47 | 17.63 |
| Dubai (DFMGI)            | 2,547.34  | 0.34  | -0.86 | -0.16 | 2.22  | 2.22  | 276 AED       | 1.94 | 14.88 |
| Abu Dhabi (ADI)          | 5,606.82  | 0.42  | -1.51 | -1.00 | 11.13 | 11.13 | 786 AED       | 1.46 | 17.95 |
| Bahrain (BAX)            | 1,465.43  | -0.07 | -0.55 | -0.07 | -1.63 | -1.63 | 15 BHD        | 1.32 | 11.17 |
| MUSCAT SE INDEX          | 3,701.51  | 0.12  | 1.33  | 2.47  | 1.17  | 1.17  | 5 OMR         | 0.77 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,761.82  | 1.44  | 1.22  | 1.28  | 2.67  | 2.67  |               |      |       |
| U.S. (S&P 500)           | 3,875.44  | 1.42  | 0.87  | 1.69  | 3.18  | 3.18  |               |      |       |
| U.K. (FTSE 100)          | 6,720.28  | -0.15 | 1.35  | 3.65  | 4.02  | 4.02  |               |      |       |
| Japan (Topix)            | 1,919.74  | 0.11  | 1.24  | 2.96  | 6.38  | 6.38  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,317.85  | 0.74  | -1.60 | -1.60 | 2.06  | 2.06  |               |      |       |
| China (SSE Composite)    | 3,357.74  | -0.05 | -4.12 | -4.31 | -3.32 | -3.32 |               |      |       |
| India (Sensex)           | 51,279.51 | 0.50  | 1.67  | 4.37  | 7.32  | 7.32  |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil fell for a third straight session on Wednesday as investors took profits while looking ahead to U.S. inventories data due later in the day for pointers on where prices will head next. **Brent crude for May dropped 56 cents, or 0.8%, to \$66.96 a barrel .**

#### Kuwait Market

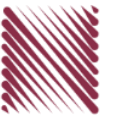
The market are closed today up by 0.14% , value traded 36.8 million KD, Premier market value traded reach 27.3 million KD and closed at 6,277 change by +0.14%, oil prices is above \$66 a barrel,

#### Saudi Market

The Market closed by +1.29%, today market Performance are linked to oil prices above \$66 a barrel and vaccine expected positive effect on overall economy .

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



| Description                 | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 0.850  | 0.35  | 2.04  | 3.03  | 1.19  | 1.19  | 5.80 KWD      | 1.55 | 27.00 |
| KFH                         | 0.750  | 0.67  | 3.16  | 3.88  | 10.78 | 10.78 | 5.71 KWD      | 2.93 | 32.00 |
| Zain                        | 0.616  | -0.16 | -0.32 | -1.75 | 1.65  | 1.65  | 2.67 KWD      | 2.03 | 14.42 |
| BOUBAYAN BANK               | 0.577  | 0.35  | 1.94  | 4.53  | 1.58  | 1.58  | 1.74 KWD      | 2.94 | 34.00 |
| Agility                     | 0.672  | -0.44 | 1.97  | 1.82  | -0.59 | -0.59 | 1.37 KWD      | 1.16 | 22.53 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 35.80  | 0.00  | 1.70  | 3.92  | 2.29  | 2.29  | 7,159.05 SAR  | 7.12 | 34.49 |
| SABIC                       | 110.80 | 1.84  | 4.33  | 7.16  | 9.27  | 9.27  | 326.36 SAR    | 1.95 | 35.00 |
| STC                         | 117.60 | 0.86  | 2.62  | 0.17  | 10.94 | 10.94 | 233.17 SAR    | 3.64 | 20.86 |
| AL-RAJHI BANK               | 99.00  | 3.13  | 11.24 | 10.74 | 34.51 | 34.51 | 239.97 SAR    | 4.13 | 21.61 |
| NCB                         | 51.80  | 3.60  | 4.96  | 9.63  | 19.49 | 19.49 | 149.98 SAR    | 1.88 | 13.36 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 20.48  | 0.79  | 1.59  | 0.69  | 21.18 | 21.18 | 176.72 AED    | 3.60 | 19.58 |
| FAB.AD                      | 14.22  | 0.14  | -4.69 | -3.27 | 10.23 | 10.23 | 155.06 AED    | 1.43 | 15.29 |
| EMIRATES NBD                | 11.35  | 1.34  | 2.25  | 1.79  | 10.19 | 10.19 | 70.75 AED     | 0.84 | 11.20 |
| DB ISLAMIC BK               | 4.64   | -0.64 | -3.33 | -3.13 | 0.65  | 0.65  | 33.81 AED     | 0.83 | 12.30 |
| EMAAR PROPERT               | 3.59   | 1.41  | -1.91 | 0.28  | 1.70  | 1.70  | 25.35 AED     | 0.45 | 9.69  |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 17.30  | 1.76  | 3.72  | 1.88  | -2.97 | -2.97 | 155.31 QAR    | 1.64 | 14.27 |
| INDUSTRIES QAT              | 12.09  | 0.83  | 5.96  | 4.49  | 11.22 | 11.22 | 71.75 QAR     | 2.15 | 36.73 |
| QA ISLAMIC BK               | 16.35  | 3.61  | 4.01  | 4.74  | -4.44 | -4.44 | 36.88 QAR     | 1.67 | 13.04 |
| MASRAF AL RAYA              | 4.18   | -0.17 | 0.14  | -5.30 | -8.04 | -8.04 | 31.06 QAR     | 2.19 | 14.43 |
| MESAIEED PETRO              | 1.95   | 1.41  | 4.06  | 3.29  | -4.89 | -4.89 | 23.86 QAR     | 1.53 | 45.28 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.422  | -1.40 | 1.44  | 5.47  | 7.07  | 7.07  | 1.39 OMR      | 0.68 | 8.33  |
| OMANTEL                     | 0.732  | 0.00  | -2.66 | -4.69 | 1.11  | 1.11  | 0.55 OMR      | 0.99 | 7.69  |
| BANK DHOFAR                 | 0.107  | 0.00  | 0.00  | 1.94  | 8.25  | 8.25  | 0.32 QAR      | 0.46 | 14.93 |
| NAT BANK OF OMAN            | 0.148  | 2.78  | 12.12 | 13.85 | -7.50 | -7.50 | 0.23 QAR      | 0.44 | 12.71 |
| OMINVEST                    | 0.328  | -1.21 | -2.37 | -1.79 | -2.37 | -2.37 | 0.27 QAR      | 1.04 | 6.85  |

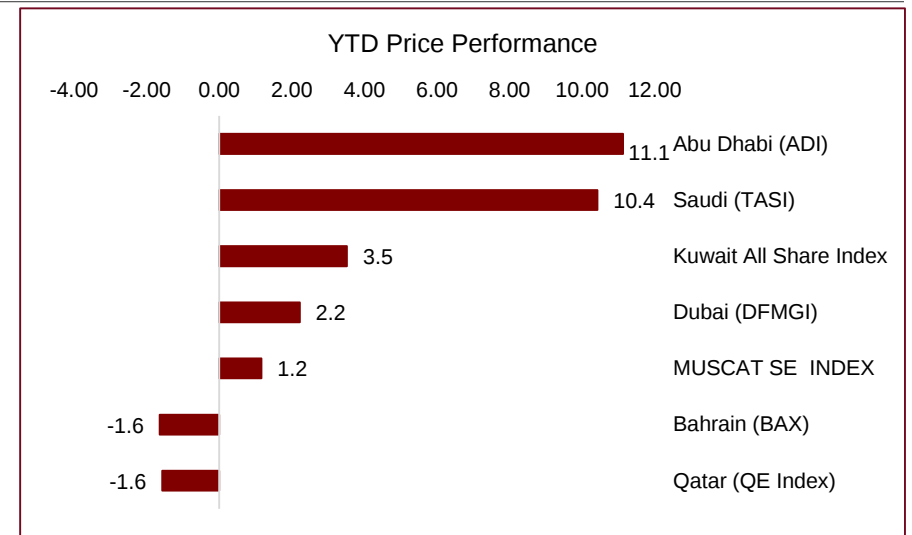
### Foreign Holdings

| Date      | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
|-----------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| 24-Feb-21 | 19.66% | 11.87% | 0.06% | 1.07% | 0.31%   | 4.64% | 2.61% | 10.30% | 5.02% | 4.00% |
| 3-Mar-21  | 19.51% | 11.86% | 0.06% | 1.04% | 0.31%   | 4.58% | 2.57% | 10.25% | 5.01% | 4.00% |

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market are up today by + 0.14 %The leading sector best performance indices today are Consumer services 1.25 % Banking 0.3 % Utilities 0 % respectively.

from YTD performance perspective the best sector performance are Basic materials by 18.7 % while the bottom sector performance is Utilities by -6.5 %.

Telecommunication sector are down today by -0.01 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-0.75 %.

### KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by + 1.84 %

STC are have positive performance today by + 0.86 %, Al Rajhi Bank have positive performance today by + 3.13 %

### UAE

ETISALAT AD close 0.79% and act defensively with COVID19



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